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FOREIGN AGRICULTURE CIRCULAR

UNITED STATES DEPARTMENT OF AGRICULTURE
FOREIGN AGRICULTURAL SERVICE
WASHINGTON, D.C.

FW 1-54 April 7, 1954

WOOL MOVEMENT FROM SOUTHERN HEMISPHERE

Exports of wool from the 5 major producing countries of the Southern Hemisphere decreased by 14 percent for the current season through December 1/ as compared to the same period of the previous season. The decline in exports occurred for the most part in the movement from the South American countries which was only partially offset by increased exports from Oceania and Africa.

Exports from Argentina, and Uruguay declined sharply from the high level of a year earlier. Large stocks previously accumulated due to resistances to lower prices were moved into trade channels during the 1952-53 season. Since prices have declined this season the tendency to hold back supplies is again evident.

Larger exports from Australia reflects the continued high level of production and the dominant position for Australian wool in the world market. However, exports to the United Kingdom, United States and Japan declined by 18 percent below the corresponding period of 1952, while more than an offsetting increase occurred in exports to Continental Europe.

Exports from New Zealand have been slightly below last season while the movement out of South Africa was slightly larger. The decline in New Zealand's exports was due primarily to smaller shipments to the United States while the increase from South Africa occurred in the movement of larger quantities to the United States and Continental Europe.

The rate of world consumption during the first half of 1953 was about 33 percent above the same period of 1952, 10 percent above the first half of 1951 and less than 10 percent below 1950. However, the rate of consumption declined sharply from this high level during the latter part of 1953 and total consumption for 1953 (estimated at 2,600 million pounds, clean) was only about 11 percent greater than 1952. The decline in consumption which occurred late in 1953 was due to an appreciable decrease in the rate of consumption for both the United States and the United Kingdom. However, in the case of the United States the decline in imports was also partially due to heavier use of domestic wool and trade stocks.

1/ Season begins July 1 for Australia, New Zealand and Union of South Africa and October 1 for Argentina and Uruguay.

This circular was summarized in the March 29, 1954 issue of Foreign Crops and Markets.

WOOL: Exports from Southern Hemisphere Countries 1953-54 season through December 1/, with comparisons

(Actual Weights)

Principal Countries of Destination	Australia		New Zealand		Union of South Africa		Argentina		Uruguay		Total 5 Countries	
	1952-53	1953-54	1952-53	1953-54	1952-53	1953-54	1952-53	1953-54	1952-53	1953-54	1952-53	1953-54
	Mil. Lbs.	mil. Lbs.	Mil. Lbs.	Mil. Lbs.	Mil. Lbs.	Mil. Lbs.	Mil. Lbs.	Mil. Lbs.	Mil. Lbs.	Mil. Lbs.	Mil. Lbs.	Mil. Lbs.
United States	38.5	33.6	22.9	10.9	6.9	11.9	73.5	9.8	20.1	0.8	161.9	67.0
United Kingdom	195.9	165.4	61.4	70.0	34.9	27.5	36.1	1.6	23.4	9.9	351.7	274.4
Canada	3.5	1.9	4.0	1.8	0.3	0.2	0.6	-	-	-	8.4	3.9
Japan	70.1	43.6	1.0	0.7	7.1	1.7	1.4	7.0	3.2	0.4	82.8	53.4
U.S.S.R.	-	26.9	-	-	-	-	-	-	-	-	-	26.9
Continental Europe												
France	80.3	97.8	11.0	18.2	18.4	23.4	0.1	-	4.2	0.8	114.0	140.2
Belgium	38.2	50.6	4.0	3.7	5.0	9.4	15.0	0.3	4.0	0.7	66.2	64.7
Germany	25.0	29.5	4.1	6.4	18.3	16.0	7.5	2.7	4.7	2.0	59.6	56.6
Italy	47.4	65.8	1.9	0.9	13.4	17.8	1.8	0.3	8.1	0.5	72.6	85.3
Other	8.6	17.3	10.2	5.1	1.6	0.9	6.4	1.3	6.8	5.8	33.6	30.4
Total	199.5	261.0	31.2	34.3	56.7	67.5	30.8	4.6	27.8	9.8	346.0	377.2
Other	12.1	21.8	5.0	4.5	2.3	2.4	1.6	1.3	0.9	1.4	21.9	31.4
Total	519.6	554.2	125.5	122.2	108.2	111.2	144.0	24.3	75.4	22.3	972.7	834.2
Percent of change from 1952-53	+ 6.6%		-2.6%		+ 2.8%		- 83.1%		- 70.4%		- 14.2%	

1/ Season begins July 1 in Australia, New Zealand and South Africa and October 1 in Argentina and Uruguay.

Compiled from official sources and reports of U. S. Foreign Service officers.

Foreign Agricultural Service.--March 1954.

World supplies of raw wool estimated at about 2,550 million pounds clean basis for 1953-54 appear to be adequate. Prices have tended downward during the current season, reflecting the lower rate of consumption. However, current prices are above a year ago. Increased support of the market by the Continent and fairly active buying by U.S.S.R. have helped to maintain prices. Also the tendency towards holding Argentine and Uruguayan wool off world markets has added a steadying influence.

United States Imports of Wool

United States imports of dutiable apparel wools are presented on a semi-annual and a calander year basis and are not comparable to export data shown in the preceding tables. Compared to 1952, imports of dutiable apparel wools in 1953 decreased by 33 percent. The lower imports reflects a decline in consumption as well as an increase in use for domestic wools and trade stocks.

Imports of carpet wools (not shown in the accompanying table) totaled 71.8 million pounds in 1953 as compared to 78.7 million in 1952. Imports of duty free wools, other than carpet, totaled 59.5 million pounds during 1953 as compared to 43.1 million pounds in 1952. This increase in imports reflected the greater use of wool during 1953 in the manufacture of floor coverings. Imports of all raw wool during 1953 totaled 294 million pounds, a decrease of 20 percent from the 1952 level.

United States Imports of Tops

United States imports of tops of hair, which are practically all sheep's wool, totaled only 537,000 pounds during the last quarter of 1953 as compared to 7,565,000 pounds for the same quarter of 1952. Imports from Uruguay, the chief source of United States imports, total only 117,000 pounds during the final quarter of 1953 as compared to 5,564,000 in the corresponding period of 1952. Imports from Argentina are relatively small, but a similar decline occurred during the final quarter of 1953 in top imports from the Argentine.

However, United States top imports from Uruguay during the final quarter of 1952 represented a 500 percent increase when compared to the corresponding quarter of 1951. In May of 1953, after determining that the dollar exchange rate granted Uruguayan exporters of tops was 18 percent above the average base rate, the United States Government placed a countervailing duty of 18 percent on top imports of Uruguayan origin. This countervailing duty was reduced to 6 percent in February of this year as a result of a corresponding reduction in the exchange rate.

Other suppliers of tops include the United Kingdom, Australia, Italy and some of the Western European countries. It is noteworthy that imports from these countries also declined during the last quarter of 1953 as compared to the same period of 1952.

TOPS OF HAIR 1/: United States Imports from Argentina and Uruguay and total all countries by months.

Period	Argentina	Uruguay	Others	Total All Countries
	Quantity	Quantity	Quantity	Quantity
	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds
1952-53 Season				
October	232	4,513	1,058	5,803
November	0	449	636	1,085
December	9	602	66	677
Sub-total	241	5,564	1,760	7,565
January	-	474	19	493
February	-	814	56	870
March	54	706	1	761
April	53	666	28	747
May	24	1,496	35	1,555
June	-	292	92	384
July	-	54	6	60
August	-	73	7	80
September	-	84	62	146
Total	372	10,223	2,066	12,661
1953-54 Season				
October	92	117	8	217
November	-	0	78	78
December	0	0	242	242
Sub-total	92	117	328	537

1/ Includes tops of camel hair, mohair, wool, alpaca and vicuna. (Practically all sheep's wool.)

DUTIABLE APPAREL WOOL: United States imports for consumption by principal countries, averages 1936-40, 1941-45 and 1946-50, annual 1951-53. 1/
(clean content)

Country	Averages			2/ 1951			2/ 1952			2/ 1953		
	1936-40	1941-45	2/1946-50	January-June	July-December	January-December	January-June	July-December	January-December	January-June	July-December	January-December
	1,000 Pounds	1,000 Pounds	1,000 Pounds	1,000 Pounds	1,000 Pounds	1,000 Pounds	1,000 Pounds	1,000 Pounds	1,000 Pounds	1,000 Pounds	1,000 Pounds	1,000 Pounds
					Wool not finer than 40's							
Australia	121	36	354	81	155	236	50	214	264	56	84	140
New Zealand	1,062	436	663	256	592	848	1,319	2,007	3,326	1,960	1,909	3,869
Uruguay	812	676	344	137	124	261	85	176	261	116	131	247
Argentina	8,345	19,857	19,810	9,923	4,145	14,068	5,557	7,598	13,155	10,980	5,281	16,261
Other Countries	1,258	671	509	617	227	844	757	324	1,081	579	652	1,231
Total	11,598	21,676	21,680	11,014	5,243	16,257	7,768	10,319	18,087	13,691	8,057	21,748
					40's to 44's							
Australia	78	45	332	109	259	368	445	398	843	91	88	179
New Zealand	1,179	2,846	5,393	2,550	2,098	4,648	5,885	8,855	14,740	3,295	4,366	7,661
Uruguay	1,490	2,296	1,641	537	173	710	208	289	497	403	293	696
Argentina	1,172	10,099	5,502	219	103	322	204	175	379	494	328	822
Other Countries	592	369	329	220	191	411	306	354	660	176	223	399
Total	4,511	15,655	13,197	3,635	2,824	6,459	7,048	10,071	17,119	4,459	5,298	9,757
					44's to 56's							
Australia	1,829	3,541	5,368	3,717	2,460	6,177	5,246	4,204	9,450	2,366	1,591	3,957
New Zealand	1,834	10,524	12,003	5,994	8,431	14,425	13,902	13,236	27,138	5,650	3,745	9,395
Uruguay	7,711	25,213	7,023	6,668	1,327	7,995	1,027	1,383	2,410	2,108	1,215	3,323
Argentina	4,596	31,398	12,070	2,553	1,094	3,647	771	2,936	3,707	5,086	4,377	9,463
Other Countries	4,164	9,475	6,103	2,991	2,060	5,051	1,845	2,858	4,703	1,454	1,217	2,671
Total	20,134	80,151	42,567	21,923	15,372	37,295	22,791	24,617	47,408	16,664	12,145	28,809
					Over 56's							
Australia	18,948	168,462	102,420	57,786	55,580	113,366	50,140	32,361	82,501	25,461	16,547	42,008
New Zealand	152	2,862	2,665	1,742	3,360	5,102	5,786	3,674	9,460	1,067	681	1,748
Union of South Africa	8,218	21,584	23,651	13,869	8,459	22,328	15,058	7,981	23,039	6,330	3,686	10,016
Uruguay	7,623	32,689	42,816	40,276	8,549	48,825	7,393	21,502	28,895	17,318	7,152	24,470
Argentina	12,240	32,835	19,366	7,074	2,408	9,482	1,211	10,555	11,766	15,591	6,042	21,633
Other Countries	2,107	6,084	6,025	6,116	3,479	9,595	1,605	4,760	6,365	1,304	1,407	2,711
Total	49,288	264,516	196,943	126,863	81,835	208,698	81,193	80,833	162,026	67,071	35,515	102,586
Total apparel wool	85,531	381,998	274,387	163,435	105,274	268,709	118,800	125,840	244,640	101,885	61,015	162,900

1/ Excludes courtesy and carbonized wool. 2/ Preliminary.

Source: Bureau of Census, Department of Commerce.

Compiled in Livestock and Livestock Products Division, FAS, March 1954.

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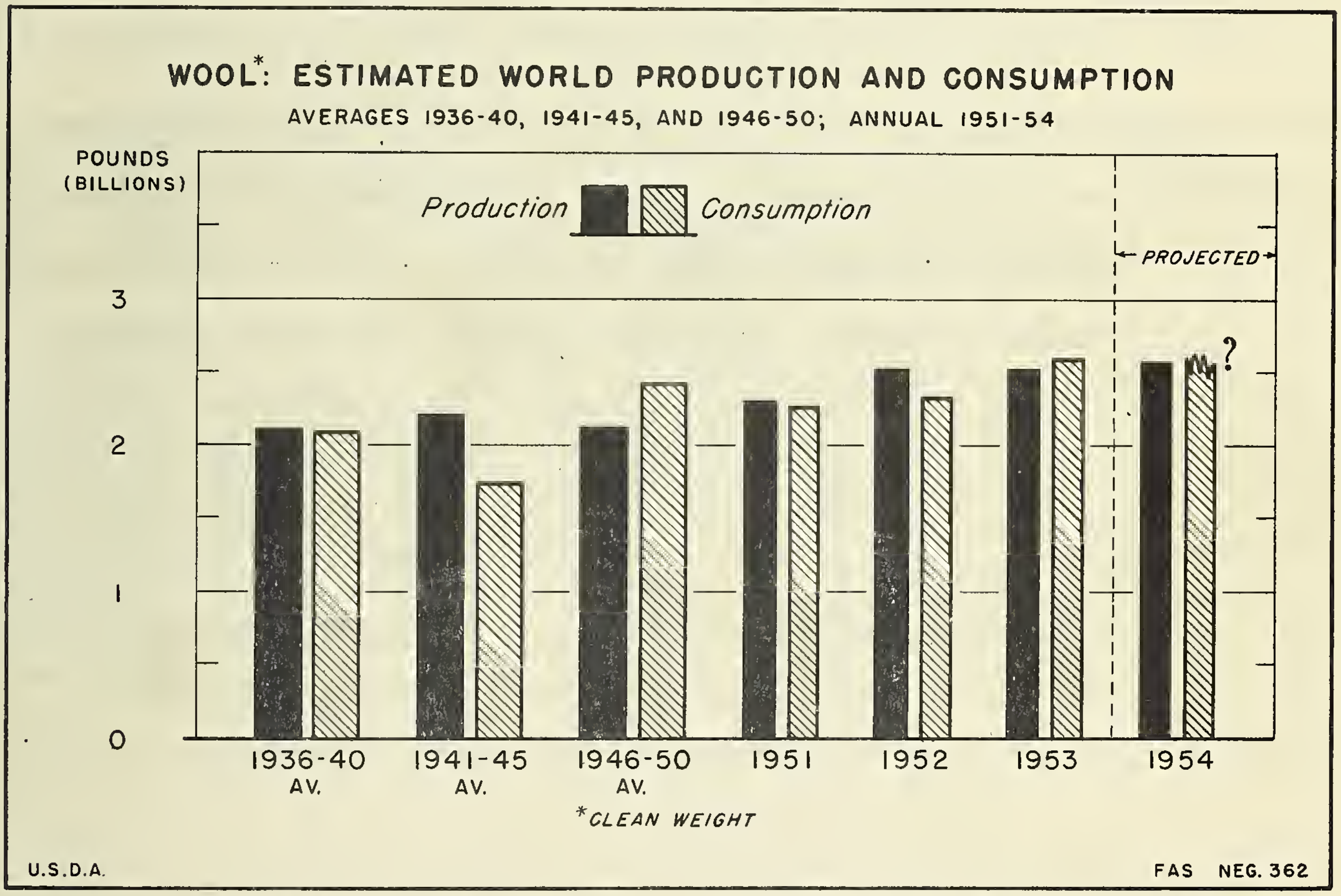
FW-2-54 July 2, 1954

WORLD WOOL PRODUCTION IN 1954

World wool output for the 1954 season is estimated at 4,420 million pounds, greasy basis, as compared to an estimated 4,370 million for the 1953 season according to information available to the Foreign Agricultural Service. This forecast for another record output in 1954 represents an increase of almost 500 million pounds above the prewar level of production.


WOOL*: ESTIMATED WORLD PRODUCTION AND CONSUMPTION
AVERAGES 1936-40, 1941-45, AND 1946-50; ANNUAL 1951-54

*CLEAN WEIGHT
U.S.D.A.
FAS NEG. 362

The world's wool supplies are usually consumed about as produced. During World War II normal consumption patterns were disrupted as Japan and Continental Europe were unable to import wool from the major producing countries. This resulted in large accumulatons of stocks. These stocks were moved into trade channels during the 1946-50 period and consumption materially exceeded production as all countries filled their long unsatisfied demands. In 1952 production exceeded consumption when large stocks accumulated in Argentina and Uruguay. These stocks were consumed in 1953. Current production and consumption are approximately in balance.

On a clean basis world output in 1953 totaled about 2,520 million pounds, while world consumption was estimated at around 2,600 million pounds. The 1954 output, on a clean basis, will likely approximate 2,550 million pounds. During the first quarter of 1954, consumption in the principal wool consuming countries was estimated at 5 percent below the previous three months and 9 percent below the comparable period of a year earlier. This indicates that current production and consumption are approximately in balance.

Practically all countries of the world are now at, or exceeding, prewar levels of production. The chief exceptions are the United States, Canada and Western Germany where economic conditions are relatively unfavorable for wool as compared to other farm enterprises.

The situation in the United States, Canada and Western Germany is in direct contrast to the position in the 5 important wool producing countries of the Southern Hemisphere. These 5 countries, Australia, New Zealand, Union of South Africa, Argentina and Uruguay produce almost 60 percent of the world's wool supply. In these countries the sheep industry competes successfully with alternative enterprises for land and labor. Also, the paramount importance of wool to the National economy in these countries has contributed to the development of highly efficient systems of wool marketing in most of the countries.

WOOL: Estimated world production, greasy basis, by continents, averages 1936-40, 1946-50, annual 1953 and 1954

Continent	Averages				Increase (+) or decrease (-)	
	1936-40	1946-50	1953	1954	1954 1936-40	1954 1953
	Million pounds	Million pounds	Million pounds	Million pounds	Percent	Percent
N. America..	452	309	293	285	-37.0	- 2.7
Europe......	488	426	504	510	+ 4.5	+ 1.2
U.S.S.R.....	310	312	400	390	+25.8	- 2.5
Asia........	344	356	404	411	+19.5	+ 1.7
S. America..	639	733	732	741	+16.0	+ 1.2
Africa......	337	282	355	354	+ 5.0	- 0.3
Oceania.....	1,366	1,432	1,682	1,725	+26.3	+ 2.3
Total 1/...	3,930	3,850	4,370	4,420	+12.5	+ 1.1

1/ Rounded to tens of millions of pounds. Foreign Agricultural Service, June 1954.

In Australia, revised estimates illustrate conclusively that the rapid spread of myxomatosis among the rabbit population and the consequent improvement of pastures brought about an abrupt increase in output in 1952. Due to less favorable weather conditions which resulted in lighter fleece weights, the 1953 output is estimated slightly below the previous season. However, since the upward trend in Australian sheep numbers has continued into 1954, it appears reasonable to assume a normal increase in wool production. The average weight per fleece should be about the same as last season. The heaviest sheep-carrying areas in New South Wales have experienced a dry summer and autumn; but Victoria and South Australia have had a much better summer and autumn. Also the Western Division of New South Wales and the sheep areas of Queensland had, on the whole, a satisfactory season. The increased acreage in improved pastures in New South Wales, Victoria and South Australia in particular is undoubtedly a factor which will tend to increase fleece weights, disregarding weather factors in individual seasons.

Sheep numbers have also reached a record level in New Zealand where the productivity of lambs and wool per breeding ewe is remarkably high. The 23.8 million breeding ewes in 1953 produced a lamb crop of 23.2 million, more than 97 lambs per 100 ewes. The percentage lamb crop in each of the preceeding years was over 94. These factors coupled with improved pastures and bringing new lands into production suggest that some further increase in output of wool is likely in 1954 for New Zealand.

The 1954 output of wool in the other major Southern Hemisphere countries is not expected to be greatly different from 1953. However, the output in both Uruguay and the Union of South Africa is at record levels while the downward trend in wool production evident in Argentina during the early postwar period has apparently been reversed.

The moderate upward trend in the output of wool for both Europe and Asia, excluding the U.S.S.R., is likely to continue in 1954 as a result of a small increase in the aggregate numbers of sheep for these areas. The Soviet output is likely to decline slightly in 1954 as the result of a severe winter and inadequate feed supplies which resulted in some death losses and a possible decline in sheep numbers. This may have contributed to some extent, to the notable increases in Soviet purchases of both wool and wool cloth this season, which in turn contributed to the development of a firm tone in the world wool market.

WOOL: Production in specified countries, greasy basis, averages 1936-40 and 1946-50; annual 1951 to 1954 1/

Continent and country	Averages		1951	1952	1953 2/	1954 2/
	1936-40	1946-50				
	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds
NORTH AMERICA						
Canada	15.6	12.4	6.9	7.7	8.6	9.0
Mexico	10.3	11.4	13.7	13.2	12.8	13.0
United States						
Shorn	360.6	238.5	225.5	232.4	230.3	-
Pulled	64.7	46.5	25.9	33.6	41.0	-
Total	425.3	285.0	251.4	266.0	271.3	262.0
Estimated total 3/	451.7	309.4	272.5	287.5	293.3	284.6
EUROPE						
Finland	2.7	3.2	4.4	4.5	4.5	4.5
France	37.1	30.6	40.0	41.9	41.9	43.1
Germany, Western	21.7	17.3	15.4	14.8	13.7	12.0
Greece	19.3	17.4	17.0	19.2	21.2	22.3
Ireland	17.2	13.1	14.0	15.4	16.5	16.5
Italy	30.4	30.2	35.5	35.0	34.8	35.0
Netherlands	6.1	5.4	6.5	6.5	6.5	6.5
Norway	5.9	6.4	7.7	7.8	7.9	8.0
Portugal	16.3	18.4	22.0	22.0	22.5	22.7
Spain	70.0	83.2	90.0	93.0	94.0	95.0
United Kingdom	110.1	81.2	91.8	102.0	105.0	109.0
Yugoslavia	34.7	30.0	32.5	33.0	35.0	35.0
Total Western Europe	378.8	343.6	384.1	402.2	410.5	416.6
Other Europe 4/	104.5	82.2	92.2	92.9	93.6	93.6
Estimated total (excl. U.S.S.R.) 5/6/	488.3	425.8	476.3	495.1	504.1	510.2
U.S.S.R. (Europe and Asia) 5/	310.2	311.5	380.0	400.0	400.0	390.0

ASIA						
Iran	36.3	29.3	34.2	36.6	37.5	38.6
Iraq	21.6	27.3	30.0	32.0	32.0	32.0
Lebanon	-	1.2	2.4	2.5	1.5	2.6
Syria	10.7	12.2	15.0	19.6	20.3	21.0
Turkey	67.7	70.7	72.9	77.9	83.4	85.0
Afghanistan	15.0	16.4	18.0	18.0	18.0	18.0
China 7/	88.0	75.0	75.0	75.0	75.0	75.0
India 8/	72.9	51.8	52.0	58.0	56.0	58.0
Japan	-	-	3.2	4.5	5.3	5.0
Pakistan	-	26.4	27.2	30.0	30.0	31.0
Estimated total 9/	344.2	355.6	374.8	399.1	404.0	411.2
SOUTH AMERICA						
Argentina	411.0	449.8	420.0	407.0	400.0	410.0
Brazil	35.5	42.7	51.8	50.7	52.5	53.0
Chile	32.6	42.3	41.9	44.1	39.7	38.0
Falkland Islands	4.0	4.2	4.2	4.4	5.0	5.0
Peru	19.4	18.8	19.6	19.8	20.1	20.3
Uruguay	126.2	162.9	187.4	189.8	202.5	202.5
Estimated total 10/	638.9	733.4	736.5	727.7	731.7	740.7
AFRICA						
Algeria	22.6	16.2	22.8	28.0	29.0	26.0
Egypt	7.5	6.7	6.6	7.0	8.0	8.0
French Morocco	35.1	27.2	35.3	36.0	31.5	31.0
Tunisia	12.0	9.9	12.0	11.0	12.0	12.0
Union of South Africa 11/	252.3	215.9	240.0	256.8	268.0	270.0
Estimated total 12/	336.8	281.9	323.5	345.6	355.3	353.8
OCEANIA						
Australia	1,051.9	1,060.0	1,080.0	1,300.0	1,260.0	1,300.0
New Zealand	313.8	371.6	406.7	418.0	422.0	425.0
Estimated total	1,365.9	1,431.7	1,486.8	1,718.1	1,682.1	1,725.1
Estimated world total 13/	3,930.0	3,850.0	4,050.0	4,370.0	4,370.0	4,420.0

1/ For summary purposes wool produced mostly in the spring in the Northern Hemisphere is combined with that produced in the season beginning July 1 or October 1 of the same year in the Southern Hemisphere. Pulled wool is included for most countries at its greasy equivalent. 2/ Preliminary. 3/ Includes estimates for Newfoundland, Netherland West Indies, Guatemala, and El Salvador. 4/ Includes the Iron Curtain Countries, (Albania, Bulgaria, Czechoslovakia, Hungary, Poland, Rumania and Eastern Germany). 5/ Based on present boundaries. 6/ Includes estimates for countries producing 2 million pounds or less, namely Belgium, Denmark, Iceland, Sweden and Switzerland. 7/ Includes China Proper (22 provinces) Manchuria, Jehol and Sinkiang (Turkestan). 8/ Includes Pakistan. 9/ Includes estimates for Afghanistan, Cyprus, Palestine, Transjordan, Outer Mongolia, Tibet, Napal and China. 10/ Includes relatively small production in Bolivia, Colombia, Ecuador, Paraguay and Venezuela. 11/ Union of South Africa, Union Protectorate and South West Africa. 12/ Includes estimates for Kenya, French West Africa and Togo. 13/ Rounded to tens of millions.

Foreign Agricultural Service. Prepared or estimated on the basis of official statistics of foreign governments, reports of U.S. Foreign Service officers, results of office research and other information. Estimates for countries having changed boundaries have been adjusted to present boundaries except as noted. June, 1954.

The North American output of wool is expected to decline in 1954 reflecting the smaller sheep numbers in the United States coupled with an expected decline in lamb slaughter.

A summary of this information was published in the June 21, 1954 issue of Foreign Crops and Markets.

This report is based upon estimates of the spring clip in the Northern Hemisphere combined with an estimate for wool production in the Southern Hemisphere during the season beginning July 1 or October 1 of the same year. Pulled wool is included for most countries at its greasy equivalent. Data, especially for the Southern Hemisphere, are reviewed each fall.

This is one of a series of regularly scheduled reports on world agricultural production approved by the Foreign Agricultural Service Committee on Foreign Crop and Livestock Statistics. It is based in part upon U.S. Foreign Service reports.

27

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FW 3-54

July 28, 1954

WORLD TRADE IN RAW WOOL AT HIGH LEVEL IN 1953

World trade in raw wool is estimated at approximately 2.5 billion pounds during 1953 and 2.3 billion in 1952. The 1953 movement compares favorably to the 1950 level of 2.6 billion pounds and the 1946 record of 2.8 billion pounds. The Korean boom was at its highest in 1950, while the large wartime stocks of wool began moving to deficit countries in 1946.

Part of the increase in world wool trade in 1953 resulted from the orderly shipment of the 1952-53 South American clip, in addition to a large portion of the 1951-52 clip which accumulated in Argentina and Uruguay in 1952. However, the increase in trade during 1953 was largely the direct result of a high level of world wool consumption. World consumption was at its highest level during the first half of 1953 while the total for the year, estimated at 2,600 million pounds, was the second highest on record, being exceeded by only 80 million pounds in 1950.

World production during 1953 is estimated at about 4,370 million pounds, greasy basis. On a clean basis this represents about 2,520 million pounds of wool, or 80 million pounds less than consumption. Consumption increased appreciably in the principal consuming countries, and a corresponding increase occurred in the intake of wool into these countries. In aggregate this suggests that the net change was very small in total stocks of wool in the principal consuming countries during 1953. However, it is probable that a small decline occurred in total world stocks of raw wool during 1953.

Trade in wool for the most part is between a relatively few major producing countries of the Southern Hemisphere and a small number of the more industralized countries of the Northern Hemisphere. During 1953 about 90 percent of the wool entering world trade came from 5 countries in the order named: Australia, New Zealand, Argentina, Union of South Africa and Uruguay. On the other hand 7 countries (United Kingdom, United States, France, Japan, Germany, Italy and Belgium) accounted for more than 90 percent of the recorded imports of wool during 1953.

WOOL (Actual weight): International trade, averages 1935-39, and 1946-50, annual 1951, 1952 and 1953

Continent and country	Average 1935-39		Average 1946-50		1951 1/		1952 1/		1953 1/	
	Exports	Imports	Exports	Imports	Exports	Imports	Exports	Imports	Exports	Imports
	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds
NORTH AMERICA										
Canada	6,241	19,337	3,418	40,223	2,081	29,822	2,827	24,363	1,616	26,831
Mexico	2/	2,041	1,120	7,430	0	7,434	0	6,720	3/	3/
United States	325	224,498	48,497	775,722	218	555,175	16	521,900	-	448,760
Total	6,566	245,876	53,035	823,375	2,299	592,431	2,843	552,983	1,616	475,591
EUROPE										
Austria	183	4/5/20,900	493	1,016	700	7,310	0	8,120	3/	11,174
Belgium	3/	226,345	3/	219,300	31,263	125,742	25,139	122,456	34,086	180,777
Denmark	353	4,149	349	10,384	639	4,665	186	4,324	3/	4,800
Finland	0	5,772	1,035	8,634	40	10,583	0	9,389	3/	9,400
France	59,575	403,345	18,666	435,400	24,932	312,800	29,900	331,700	35,900	399,053
Germany, Western	0	259,932	6/ 381	137,362	1,150	107,830	1,765	113,126	3,673	207,142
Greece	1,706	7,717	267	7,093	566	8,366	116	13,838	3/	3/
Iceland	1,512	0	964	0	549	0	3/	3/	3/	3/
Ireland	14,250	691	10,075	5,305	6,119	2,788	11,800	4,422	15,800	11,076
Italy	1,040	78,958	2,380	178,416	3,231	118,613	3,598	158,313	3/	201,312
Netherlands	3,908	16,318	2,054	40,857	1,433	20,880	1,570	22,222	2,840	24,310
Norway	272	2,161	5	8,439	35	4,866	575	4,034	3/	3/
Portugal	2,188	3,377	2,246	7,300	1,849	1,050	1,490	4,301	3,015	3,270
Spain	7/ 2,195	7/ 12,236	347	6,618	947	811	102	4,909	3/	3/
Sweden	427	16,885	1,608	29,523	417	17,895	1,496	15,415	3/	11,400
Switzerland	271	17,234	657	25,346	151	14,594	44	13,846	37	17,193
United Kingdom	38,600	628,893	17,640	556,640	15,500	505,900	28,900	694,900	24,700	827,700
Yugoslavia	1,143	8,179	230	14,266	0	11,333	1,125	10,164	3,885	6,779
Total Western Europe	127,623	1,713,092	59,397	1,691,899	89,521	1,275,996	107,806	1,535,479	123,936	1,915,686
Bulgaria	4	1,693	3/	3/	3/	3/	3/	3/	3/	3/
Czechoslovakia	4/5/ 1,050	4/5/36,387	34,776	3/	3/	3/	3/	3/	3/	3/
Hungary	839	2,126	3/	3/	3/	3/	3/	3/	3/	3/
Poland	4/ 80	46,045	0	47,681	0	50,000	3/	3/	3/	3/
Romania	600	1,334	3/	3/	3/	3/	3/	3/	3/	3/
Total Europe excluding U.S.S.R.	130,196	1,800,677	94,173	1,739,580	89,521	1,325,996	107,806	1,535,479	123,936	1,915,686
U.S.S.R. (Europe and Asia) 8/	3/	67,550	3/	9/ 43,026	3/	9/ 42,000	3/	3/	3/	3/

ASIA										
Cyprus	1,226	0	196	0	3/	0	870	0	609	0
Iran	12,890	0	6,187	585	12,855	454	11,997	551	573	21,490
Iraq	13,651	0	12,065	0	10,767	0	10,214	0	12,225	0
Israel	–	–	7/ 459	7/ 2,115	392	1,283	3/	3/	3/	3/
Lebanon	10/	10/	3/	3/	9,619	5,106	5,352	4,008	6,040	1,660
Syria	5,787	386	10,243	970	16,556	2,438	7,700	723	9,921	908
Turkey	17,639	1,182	3,607	8,755	8,483	4,938	939	12,143	881	13,800
China	23,608	0	4,340	0	3/	3/	3/	3/	3/	3/
India	49,016	12,900	29,197	11,112	18,295	3/	39,319	3/	23,709	3/
Japan	0	188,257	0	28,300	0	119,950	0	163,382	0	242,626
Pakistan	11/	11/	12/ 27,543	0	20,736	0	28,213	1,378	24,389	1,501
Total	123,817	202,725	93,837	51,837	97,703	134,169	104,604	182,185	78,347	281,985
SOUTH AMERICA										
Argentina	305,725	80	357,248	0	129,855	0	238,614	0	342,100	0
Bolivia	0	166	0	1,514	3/	3/	3/	3/	3/	3/
Brazil	10,151	3,783	7,496	4,504	1,693	5,597	1,568	7,544	22,006	1,360
Chile	23,335	769	15,409	2,332	19,246	1,080	17,291	1,567	15,924	1,940
Colombia	36	59	15	1,817	3/	3/	3/	3/	3/	3/
Ecuador	132	0	3/	3/	3/	3/	3/	3/	3/	3/
Falkland Islands	4,084	0	3/	3/	3/	3/	3/	3/	3/	3/
Peru	5,130	0	2,155	0	6,212	0	2,791	0	4,526	0
Uruguay	105,478	0	144,428	0	101,322	0	117,000	0	146,000	0
Total	454,071	4,857	526,841	10,167	258,828	6,677	377,264	9,111	530,556	3,300
AFRICA										
Algeria	12,822	0	875	4,278	6,930	542	1,800	1,770	1,110	526
Anglo-Egyptian Sudan	3/	3/	27	22	3/	3/	3/	3/	3/	3/
Kenya and Uganda	3/	3/	700	0	3/	3/	3/	3/	3/	3/
Egypt	4,489	0	856	11,267	283	1,264	787	3,068	3/	3/
French Morocco	10,036	0	3,488	2,150	5,862	110	3,690	1	22,156	882
Tunisia	4/ 3,241	0	482	243	1,788	295	1,392	54	3/	3/
Union of South Africa	228,555	0	262,300	1,546	182,410	0	232,000	0	220,000	0
Total	259,143	0	268,728	9,506	197,273	2,211	239,669	4,893	243,266	1,408
OCEANIA										
Australia	821,740	0	1,976,232	1,028	918,400	0	1,062,000	0	1,101,000	0
New Zealand	273,618	0	394,243	0	315,393	0	436,305	0	401,000	0
Total	1,095,939	0	1,470,475	1,028	1,233,793	0	1,498,305	0	1,502,000	0
World total 13/	2,069,732	–	2,507,089	–	1,879,417	–	2,330,491	–	2,479,721	–

1/ Preliminary. 2/ Less than 500 pounds. 3/ Not available. 4/ Four year average 1935-38. 5/ Beginning April 1938, trade between Austria and Germany no longer reported as foreign trade in Germany Statistics. The same applies to trade between Czechoslovakia for the period October to December 1938. 6/ Imports for Western Germany commencing September 1947. 7/ Two year average. 8/ Present territory. 9/ Based on exports from primary sources. 10/ Included in Syria. 11/ Included in India. 12/ Three year average. 13/ Re-exports have been excluded where possible.

Foreign Agricultural Service. Prepared or estimated from official statistics of foreign governments, reports of U.S. Foreign Service officers and other information. - July, 1954.

United States imports declined sharply in 1953 as larger quantities of domestic wool and trade stocks were consumed. Total stocks in the United States on January 1, 1954 were below a year earlier. In contrast, imports into the United Kingdom and the European continent increased sharply. Imports into Western Europe of 1.9 billion pounds in 1953 represented a 25 percent increase over 1952.

Most of this increase occurred in shipments to the United Kingdom, France, Belgium, and Western Germany. Aggregate supplies of wool in these countries possibly increased during 1953 as some of the increase in imports replaced working stocks which were reduced in 1951 and 1952. However, these larger imports of wool were partly used to meet an improved level of demand for wool textiles.

The current outlook is for a continued high level of world trade in wool during 1954, even though consumption in the major consuming countries during January-March was down 9 percent from the high level of a year earlier. World production during 1954 is estimated at 4,420 million pounds, 50 million above 1953. However, stocks in the United States continue at a low level, while wool consumption in this country has recovered moderately from the low level reached at the end of last year. This suggest larger imports next fall. Also, the strong demand for wool on the continent has continued through the first half of 1954.

The Dominions' 1953-54 clip showed a good clearance at primary markets and a high level of exports was indicated for the first 4 months of 1954. Prices were firm at the final auctions of the 1953-54 season in June. Less wool was left unsold in the Union of South Africa compared to a year earlier, while all the wool offered was sold in New Zealand and Australia. At the end of 1953 some tendency to hold back supplies was evident in South America. However, present indications are that most of the Uruguayan wool will be shipped before the new season begins in October. Also it seems likely that by October 1, the Argentine supplies will at least have been reduced to a normal carry-over level.--By Q. M. Morgan, based on U. S. Foreign Service reports.

A summary of this information was published in the July 19, 1954 issue of Foreign Crops and Markets.

For information on world production, by countries, see Foreign Agriculture Circular FW 2-54, available from the office of Foreign Agricultural Service, U. S. Department of Agriculture, Washington 25, D. C.

3
27

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FW-4-54

September 8, 1954

WORLD STOCKS OF APPAREL WOOL, JULY 1, 1954

World stocks of apparel wool on July 1, 1954 totaled 1,125 million pounds, clean basis, according to the latest information available to the Foreign Agricultural Service. This represents a relatively small change in world stocks from the level of a year earlier.

World stocks of wool on July 1, 1954 were equivalent to about 30 weeks supply based on the annual rate of consumption for the preceeding 12 month period. During the 1953-54 season as a whole world production and consumption were near an in-balance position. It is most probable that production and consumption will remain in close agreement during the current wool year. Some year-to-year dislocations may continue to occur in the marketing of the world's wool clip; but the immediate outlook is that large accumulations are not likely.

At the end of World War II, world stocks of wool were the largest on record. Apparel wool stocks on July 1, 1946 totaled about 2.7 million pounds, clean basis. This was about three times the 1934-39 average and represented about 85 weeks supply at the prewar rate of consumption.

A large portion of these surplus stocks consisted of Joint Organization stocks in the United Kingdom and Dominions and the Commodity Credit Corporation stocks in the United States. As a result of the high rate of world consumption in excess of production during the 1946-50 period virtually all of the wartime accumulations were moved into consumption channels by mid-1950. All of the C.C.C. holdings were disposed of by mid-1950, while Joint Organization stocks totaled only 84 million pounds on July 1, 1950.

By mid-1951 the high point of the Korean boom had past, but as a result of the record level of consumption during 1950 stocks were relatively low. During the 1951-52 season world consumption declined slightly below current production. The small excess in supplies were not taken up by the trade, and the pessimistic outlook resulted in a build-up of stocks in producing countries as dealers and manufacturers in importing countries began using trade stocks and reducing inventories.

A summary of this information was published in the September 6, 1954 issue of Foreign Crops and Markets.

Large accumulations from the 1951-52 clip occurred in Argentina and Uruguay, while the only significant build-up in Dominion supplies occurred in New Zealand.

In the spring of 1952 the British Government began stockpiling wool as strategic reserves primarily to offset the low level of trade stocks. These strategic reserves totaled about 30 million pounds on July 1, 1952 and the current total of 94 million was obtained by the British Government prior to July 1, 1953. In the United States the C.C.C. acquired about 45 million pounds of the 1952 clip under the price support program. The C.C.C. holdings totaled about 60 million pounds on July 1, 1954.

World consumption increased sharply in late 1952. As a result of this increased consumption and a favorable level of prices, the bulk of the accumulations from the 1951-52 clip in South America and New Zealand were moved into trade channels. World consumption continued to increase during the first 6 months of 1953 and wool stocks by mid-1953 were reduced near the low level of 1951.

During the third and fourth quarters of 1953 world consumption of wool declined sharply from the high level of the previous 6 months. A further slight decline occurred during the first quarter of 1954, but indications are that the rate of consumption increased slightly in the second quarter. If the annual rate of consumption during the 1954-55 season is equal to the level of the previous 12 months only an estimated 35 million pounds would be added to the world stocks of apparel wool during the 1954-55 wool year.--By Q. M. Morgan, based in part on Foreign Service reports.

WOOL STOCKS: World stocks of apparel wool, clean basis, July 1, 1954 with comparisons

Continent and Country	July 1, 1950	July 1, 1951	July 1, 1952	July 1, 1953	July 1, 1954
	Million Pounds	Million Pounds	Million Pounds	Million Pounds	Million Pounds
NORTH AMERICA					
Canada	25	27	28	25	25
United States	175	1/ 174	131	2/ 135	3/ 155
EUROPE					
Belgium	33	34	17	7	8
France	75	75	75	75	90
Germany	40	50	50	35	35
Italy	75	50	50	60	55
Netherlands	15	16	18	20	20
United Kingdom	260	165	4/ 180	5/ 275	5/ 250
ASIA					
Japan	15	15	25	25	40
SOUTH AMERICA					
Argentina 6/	40	65	160	20	7/ 30
Uruguay 6/	5	10	65	15	7/ 20
AFRICA					
Union of So. Africa	2	6	3	4	2
OCEANIA					
Australia	19	8	12	13	14
New Zealand	13	13	80	16	8/
Others and Afloat	9/ 443	10/ 372	261	390	381
Total	1,235	1,080	1,155	1,115	1,125

1/ Includes 7 million pounds strategic reserves held by C.C.C. for the Department of Defense. 2/ Includes 45 million pounds of C.C.C. stocks. 3/ Includes 60 million pounds of C.C.C. holdings. 4/ Includes strategic reserves of about 30 million pounds. 5/ Includes 94 million pounds of strategic reserves. 6/ For October 1. 7/ Based on estimated supplies probable domestic requirements, and exports through the first 10 months of the 1953-54 season with an allowance for shipments during August and September. 8/ Negligible. 9/ Includes 84 million pounds of Joint Organization stocks. 10/ Includes 4 million pounds of Joint Organization stocks.

13
27

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FW-5-54

November 26, 1954

WORLD WOOL PRODUCTION IN 1954

World wool output for the 1954 season is estimated at a record level of 4,430 million pounds, about 10 million pounds above the Foreign Agricultural Service's preliminary forecast in June. This estimate represents an increase of 70 million pounds over the 1953 output, 460 million above 1950 and 500 million above the prewar level. Most of the producing countries will show an increase, or at least maintain production equal to last year. The chief exceptions are Argentina and the Soviet Union.

WOOL: Estimated production, greasy basis, for Southern Hemisphere countries, averages 1936-40, 1946-50, annual 1953 and 1954

Country	Averages 1936-40	Averages 1946-50	1953 1/	1954 1/	Increase (+) or decrease (-) 1954 / 1936-40	Increase (+) or decrease (-) 1954 / 1953
	Million pounds	Million pounds	Million pounds	Million pounds	Percent	Percent
Australia	1,052	1,060	1,244	1,300	+ 23.6	+ 4.5
Argentina	411	450	400	390	- 5.1	- 2.5
New Zealand	314	372	425	434	+ 38.2	+ 2.1
U. of So. Africa	252	216	264	280	+ 11.1	+ 6.1
Uruguay	126	163	203	210	+ 66.7	+ 3.4
Sub total	2,155	2,261	2,536	2,614	+ 21.3	+ 3.1
All other	1,775	1,589	1,824	1,816	+ 2.3	- 0.4
World total 2/	3,930	3,850	4,360	4,430	+ 12.7	+ 1.6

1/ Preliminary 2/ Rounded to tens of millions of pounds.
Foreign Agricultural Service, November 1954.

The over-all consumption of wool apparently has not shown any significant change in recent months. The slight improvement which occurred during the second quarter of 1954 was the first in 12 months.

WOOL: Production in specified countries, greasy basis, averages 1936-40 and 1946-50, annual 1951 to 1954 1/

Continent and Country	Averages		1951	1952	1953 2/	1954 2/
	1936-40	1946-50				
	Million Pounds	Million Pounds	Million Pounds	Million Pounds	Million Pounds	Million Pounds
NORTH AMERICA						
Canada	15.6	12.4	6.9	7.7	8.6	9.0
Mexico	10.3	11.4	13.7	13.2	12.8	13.0
United States						
Shorn	360.6	238.5	225.5	232.4	230.3	229.4
Pulled	64.7	46.5	25.9	33.6	41.0	-
Total	425.3	285.0	251.4	266.0	271.3	272.0
Estimated Total 3/	451.7	309.4	272.5	287.5	293.3	294.6
EUROPE						
Finland	2.7	3.2	4.4	4.5	4.5	4.5
France	37.1	30.6	40.0	41.9	41.9	43.1
Germany, Western	21.7	17.3	15.4	14.8	13.7	12.0
Greece	19.3	17.4	17.0	19.2	20.3	22.3
Ireland	17.2	13.1	14.0	15.4	16.5	17.5
Italy	30.4	30.2	35.5	35.0	34.8	35.0
Netherlands	6.1	5.4	6.5	6.5	6.5	6.5
Norway	5.9	6.4	7.7	7.8	7.9	8.0
Portugal	16.3	18.4	22.0	22.0	22.5	22.7
Spain	70.0	83.2	90.0	93.0	94.0	95.0
United Kingdom	110.1	81.2	91.8	102.0	105.1	107.9
Yugoslavia	34.7	30.0	32.5	33.0	35.0	35.0
Total Western Europe	378.8	343.6	384.1	402.2	409.7	416.5
Other Europe. 4/	104.5	82.2	92.2	92.9	93.6	93.6
Estimated total (Excl. U.S.S.R.) 5/ 6/	488.3	425.8	476.3	495.1	503.3	510.1
U.S.S.R. (Europe and Asia) 5/	310.2	311.5	380.0	400.0	400.0	390.0

ASIA						
Iran	36.3	29.3	34.2	36.6	37.5	38.6
Iraq	21.6	27.3	30.0	32.0	32.0	32.0
Lebanon	-	-	2.4	2.5	1.5	2.6
Syria	10.7	12.2	15.0	19.6	20.3	21.0
Turkey	67.7	70.7	72.9	77.9	81.3	79.3
Afghanistan	15.0	16.4	18.0	-	-	-
China 7/	88.0	75.0	-	-	-	-
India 8/	72.9	51.8	52.0	58.0	56.0	58.0
Japan	-	-	3.2	4.5	5.3	5.0
Pakistan	-	26.4	27.2	30.0	30.0	31.0
Estimated total 9/	344.2	355.6	374.8	399.1	401.9	405.5
SOUTH AMERICA						
Argentina	411.0	449.8	420.0	407.0	400.0	390.0
Brazil	35.5	42.7	51.8	50.7	52.5	53.0
Chile	32.6	42.3	41.9	44.1	39.7	38.0
Falkland Islands	4.0	4.2	4.2	4.4	5.0	5.0
Peru	19.4	18.8	19.6	19.8	20.1	20.3
Uruguay	126.2	162.9	187.4	189.8	202.5	210.0
Estimated total 10/	638.9	733.4	736.5	727.7	731.7	728.2
AFRICA						
Algeria	22.6	16.2	22.8	28.0	29.0	26.0
Egypt	7.5	6.7	6.6	7.0	8.0	8.0
French Morocco	35.1	27.2	35.3	36.0	31.5	31.0
Tunisia	12.0	9.9	12.0	11.0	12.0	12.0
Union of South Africa 11/	252.3	215.9	240.0	256.8	264.6	280.0
Estimated total 12/	336.8	281.9	323.5	345.6	351.9	364.4
OCEANIA						
Australia	1,051.9	1,060.0	1,080.0	1,281.1	1,244.0	1,300.0
New Zealand	313.8	371.6	406.7	418.0	425.0	434.0
Estimated total	1,365.9	1,431.7	1,486.8	1,699.2	1,669.1	1,734.1
Estimated world total 13/	3,930.0	3,850.0	4,050.0	4,350.0	4,360.0	4,430.0

1/ For summary purposes wool produced mostly in the spring in the Northern Hemisphere is combined with that produced in the season beginning July 1 or October 1 of the same year in the Southern Hemisphere. Pulled wool is included for most countries at its greasy equivalent. 2/ Preliminary. 3/ Includes estimates for Newfoundland, Netherland West Indies, Guatemala, and El Salvador. 4/ Includes the Iron Curtain Countries, (Albania, Bulgaria, Czechoslovakia, Hungary, Poland, Rumania and Eastern Germany). 5/ Based on present boundaries. 6/ Includes estimates for countries producing 2 million pounds or less, namely Belgium, Denmark, Iceland, Sweden and Switzerland. 7/ Includes China Proper (22 provinces) Manchuria, Jehol and Sinkiang (Turkestan). 8/ Includes Pakistan. 9/ Includes estimates for Afghanistan, Cyprus, Palestine, Transjordan, Outer Mongolia, Tibet, Napal and China. 10/ Includes relatively small production in Bolivia, Colombia, Ecuador, Paraguay and Venezuela. 11/ Excludes karakul wool; includes Union of South Africa, Union Protectorate and South West Africa. 12/ Includes estimates for Kenya, French West Africa and Togo. 13/ Rounded to tens of millions.

Foreign Agricultural Service. Prepared or estimated on the basis of official statistics of foreign governments, reports of Agricultural Attaches and other U.S. representatives abroad, results of office research and other information. Estimates for countries having changed boundaries have been adjusted to present boundaries except as noted.-November, 1954.

World consumption during the first half of 1954 was approximately 10 percent below the record seasonal high of a year earlier. World consumption for the calander year 1953 is estimated at 2,600 million pounds, the second highest on record, being exceeded only by 80 million pounds in 1950.

Commercial stocks of apparel wool on July 1, based on the prevailing rate of consumption, were equal to only a 4 or 5 month supply. Total stocks, including the United Kingdom's strategic stockpile, C.C.C. stocks, and stocks afloat, were near the relatively low level of July 1, 1951.

However, the prospects of a new clip which represented some 50 million pounds, clean basis, above the prevailing rate of consumption resulted in a drop of some 10 to 15 percent in wool prices at the opening of the Australian auctions as compared to the end of last season. Prices at Australian auctions have fluctuated downward since September 1 with a recent tendency to strengthen. The current level of prices appear to be relatively favorable to producers generally.

The bulk of the expected increase in wool output in 1954 will occur in Australia, New Zealand, the Union of South Africa and Uruguay. In Australia, sheep numbers continue to increase and fleece weights should at least be equal to last year. Increases in sheep numbers are partially responsible for the expected gain in production in New Zealand, Union of South Africa and Uruguay. However, in New Zealand better rabbit control in high country areas, along with progressive pasture improvement, is expected to be evident in increased fleece weights this year. In South Africa heavier fleeces are expected due to favorable weather conditions in all of the sheep areas.

Earlier estimates for Argentina suggested that the Argentine production would be larger in 1954. Thus the downward trend of recent years would have been reversed. But, extensive drought in Patagonia last summer and a harsh winter in Santa Cruz have resulted in a considerable decline in prospects for Southern Argentina. The declines in output there will more than offset increases expected for the northern area. Some trade sources even expect this net decline to approach 20 million pounds.

The Soviet Union's output is likely to show a decline for 1954. Sheep numbers at the present are reportedly slightly greater than a year ago, but the severe winter which the Soviets experienced accompanied by inadequate feed supplies undoubtedly resulted in a smaller spring clip.

In the United States shorn wool production is forecast at 229.4 million pounds as compared to 230.3 million in 1953. However, pulled wool production is now expected to be larger than last year. Total output in 1954 may be a little larger than a year earlier.

This is one of a series of regularly scheduled reports on world agricultural production approved by the Foreign Agricultural Service Committee on Foreign Crop and Livestock Statistics. It is based in part upon reports of Agricultural Attaches and other U.S. representatives abroad.
A summary of this information was published in the November 22, 1954 issue of Foreign Crops and Markets.